FPMT Quick Overview

FPMT is the database agencies use to report their annual facilities inventory and baseline data for the biennial Six-Year Facilities Plan. This job aid provides basic information about FPMT, including the Home Screen, accessing agency data, system navigation and reports.

Contents

Getting Help

For all FPMT inquiries, please contact the OFM Help Desk. The Help Desk will track these contacts and assign more complex inquiries to the Facilities Planning team for response.

OFM Help Desk

HereToHelp@ofm.wa.gov

(360) 407-9100

For user education materials, please visit OFM's FPMT webpage here.

Logging In

There are two ways to log into FPMT: 1) username/password and 2) Active Directory Federation Services (ADFS), which is a single sign-on solution.

✓ Only state employees who have State Global Network (SGN) Active Directory accounts synchronized to Microsoft's Azure cloud platform can log in using single sign-on. Contact your IT department to determine if your state account meets this criteria.

✓ For instructions on how to request a new FPMT account, please refer to the [Getting Started job aid](#).

✓ For instructions on how to reset your password, please refer to the [Password Reset job aid](#).

✓ Please use Chrome or Firefox as your browser. <u>Do not</u> use Internet Explorer or Edge.

✓ The default user role is read only. You must request edit rights via the OFM Help Desk after setting up a read-only account.

Home Screen

✓ After logging in, you will be directed to the Home screen. Your permissions will determine which modules you see. All users will see Data Explorer, Reference Documents and My User Account. Other modules include Import Data and User Management.

✓ Per OCIO Policy, the system will automatically log you out after 15 minutes of inactivity. You will return to where you were when you log back in.

The Home menu will always appear in the upper left hand corner of your screen. It allows you to:
- ✓ **Navigate back to Home,**
- ✓ **Access your user account information**
- ✓ **Find information about the vendor (Help)**
- ✓ **Sign out**

Access your agency's data by opening the Data Explorer

User education materials are now available via OFM's **website** only.

Manage your user profile and update your password (before it expires) by opening My User Account

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Data Explorer - Overview

✓ To access your agency's data, click **Open** on the Data Explorer tile.

✓ When you open Data Explorer, you will always be taken to a screen called the **Starting Point**, which is the State of Washington level.

✓ You will see a tile list on the left and a map on the right of your screen.

✓ Each tile represents a specific entity such as a State, Agency, Facility, Lease Contract, Space etc.

✓ The tile list is organized into tile groups that can be expanded or collapsed.

✓ The tool bar allows you to navigate back to a previous screen (History), search for records, and filter your current view.
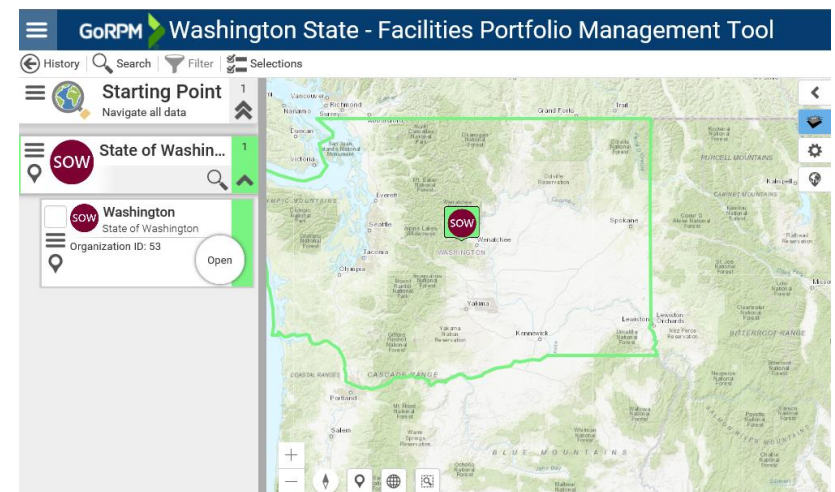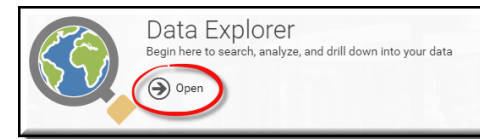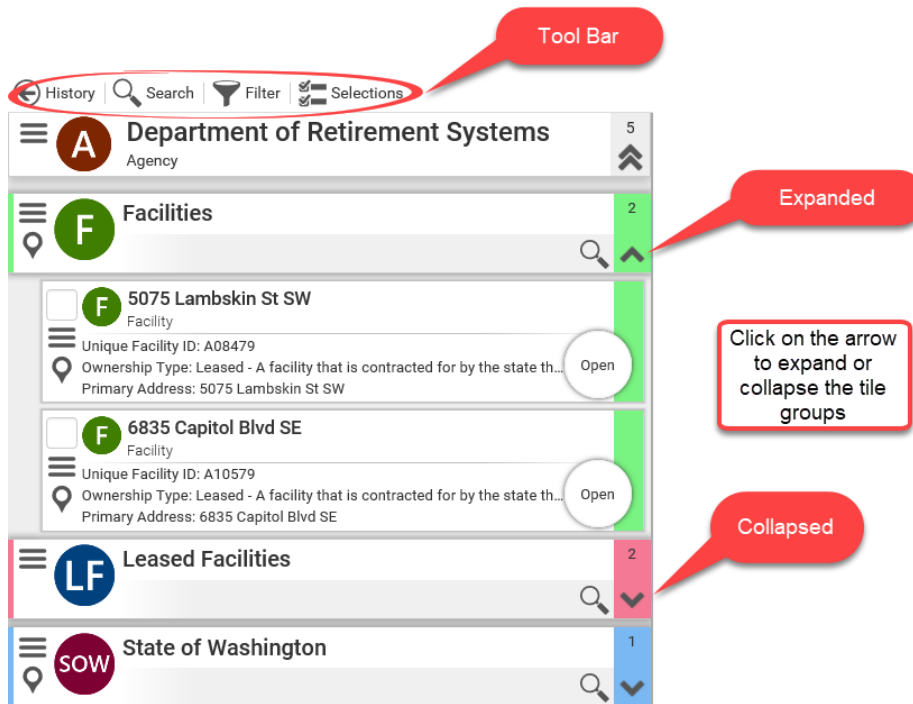
Data Explorer – Navigation

FPMT stores data in tables that are organized by a structured hierarchy. You will need to populate multiple tables to complete most tasks in the system. You can access tables by navigating through the tile list, or you can search for a specific table. The following navigation instructions show you how to search for tables.

- ✓ To locate a UFI, run the Owned Facilities or Leased Facilities Inventory Report from the agency tile.
- ✓ To locate a lease number, run the Lease Contract Inventory or Receivable Lease Contract Inventory from the agency tile.

Navigate to an Agency

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Agencies** from the dropdown menu

3. **Click** Refine by ▾ and choose **Agency Abbreviation** from the dropdown menu

4. Choose your agency from the list. You can filter the list by typing the abbreviation in the text box

5. **Click** the SEARCH button

6. **Click** Open

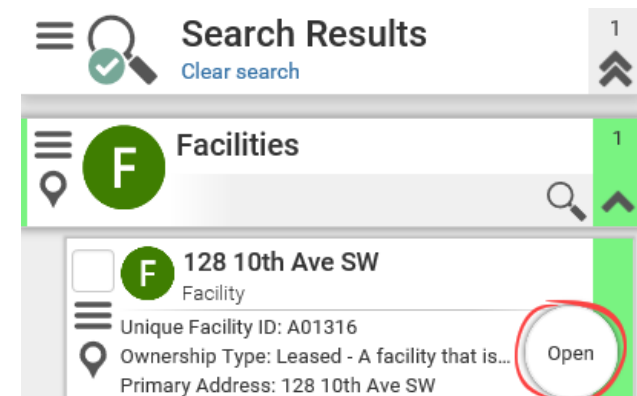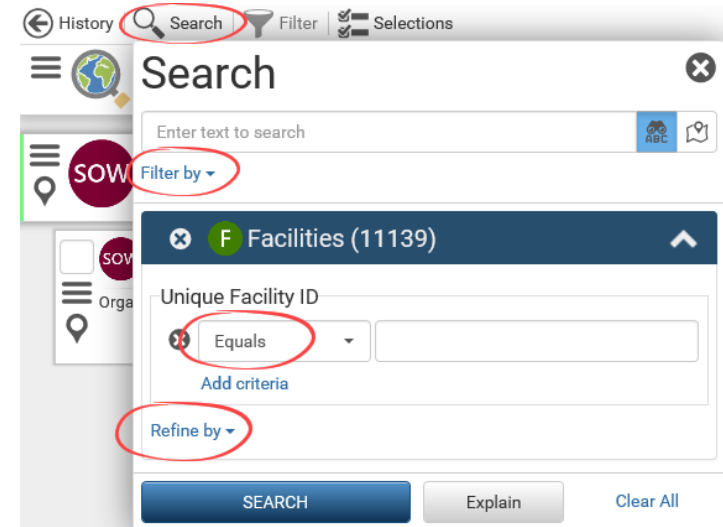**Note:** From the Agency tile list, you can easily access:
- Facilities
- Leased Facilities
- Owned Facilities
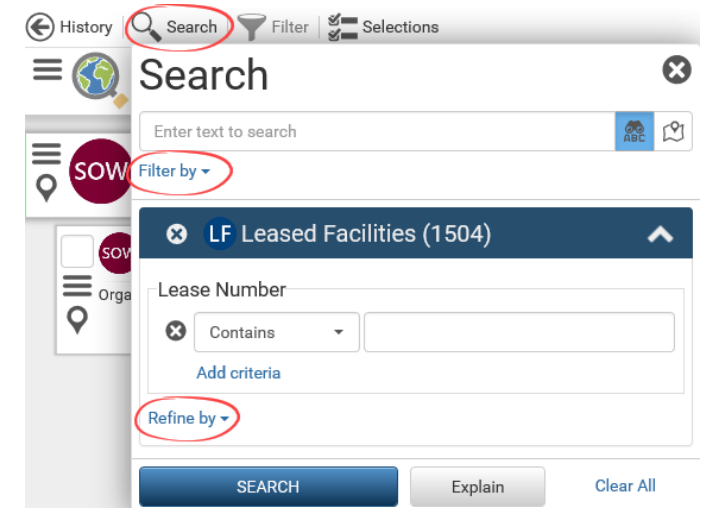- Receivable Leased Facilities
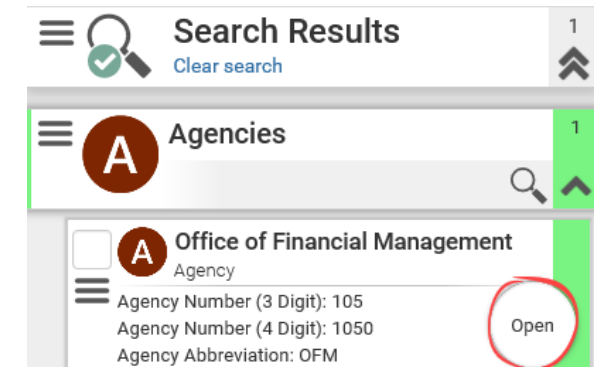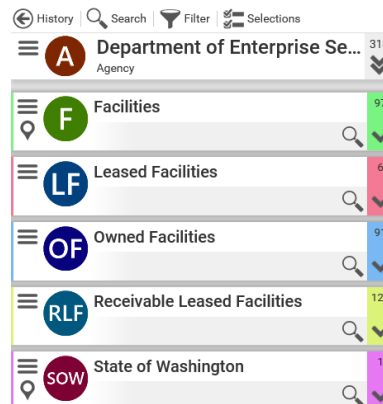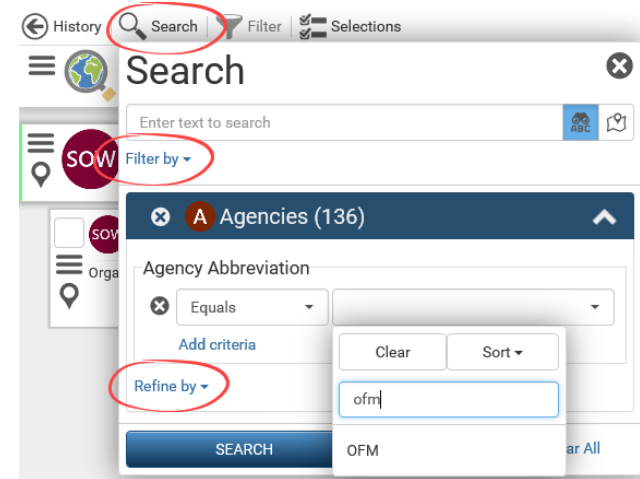
Navigate to a Facility

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Facilities** from the dropdown menu

3. **Click** Refine by ▾ and choose **Unique Facility ID** from the dropdown menu

4. **Select** Equals in the search box criteria

5. **Enter** the UFI

6. **Click** the SEARCH button

7. **Click** Open

Tip: You can also search by locating a facility on the map and clicking the green facility icon F to open the record.

Navigate to a Leased Facility

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Leased Facilities** from the dropdown menu

3. **Click** Refine by ▾ and choose **Lease Number** from the dropdown menu
   ➔ You can also use the UFI

4. **Enter** the Lease Number

5. **Click** the [SEARCH] button

6. **Click** Open

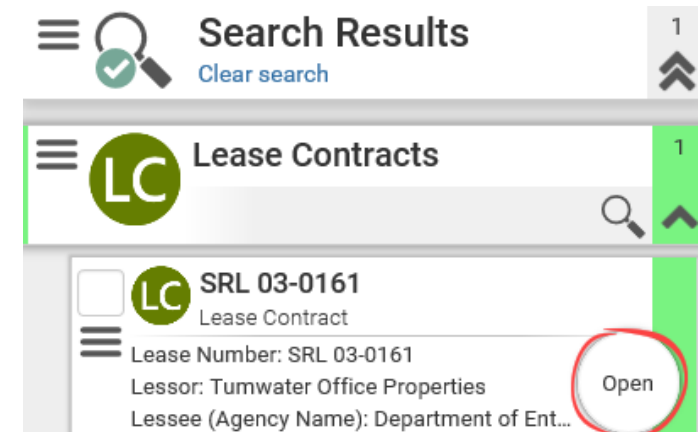**Note:** From the Leased Facility tile list, you can easily access:
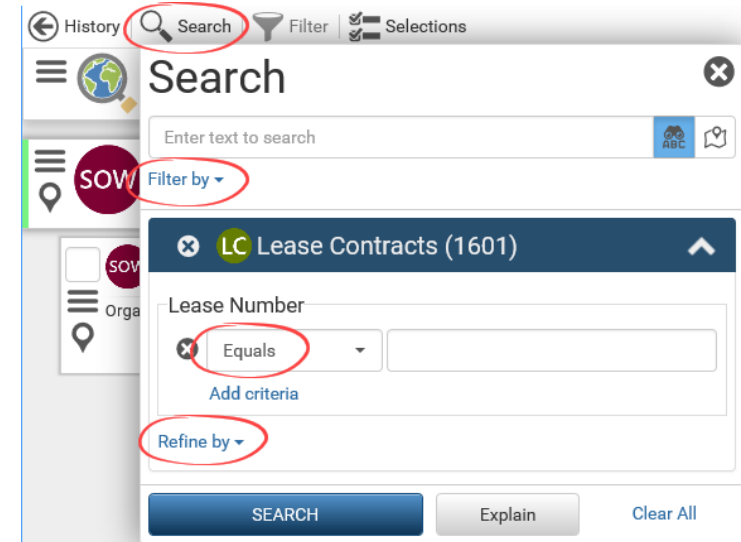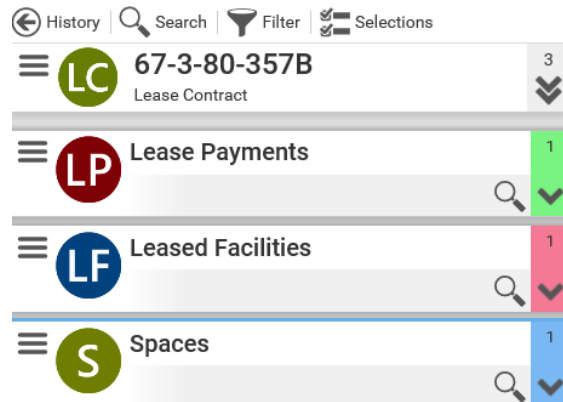- Facilities
- Lease Contracts

Navigate to a Lease Contract

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Lease Contracts** from the dropdown menu

3. **Click** Refine by ▾ and choose **Lease Number** from the dropdown menu

4. **Select** Equals in the search box criteria

5. **Enter** the Lease Number

6. **Click** the SEARCH button

7. **Click** Open

Note: From the Lease Contract tile list, you can easily access:
- Lease Payments
- Leased Facilities
- Spaces

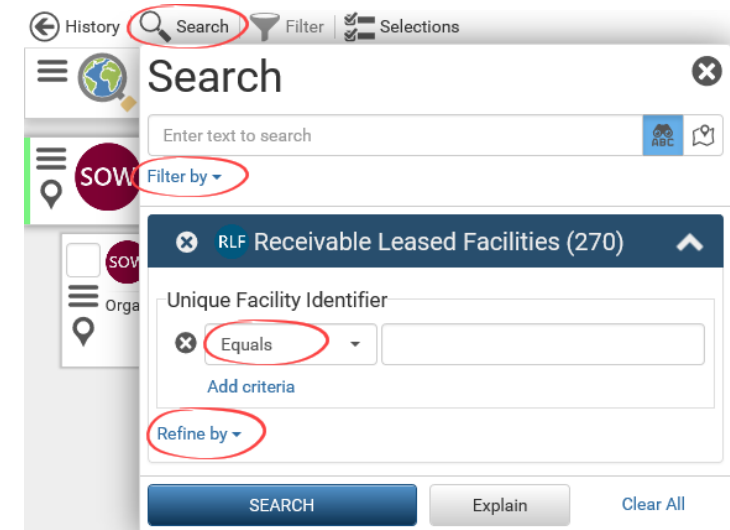## Navigate to a Receivable Leased Facility

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Receivable Leased Facilities** from the dropdown menu

3. **Click** Refine by ▾ and choose **Unique Facility Identifier** from the dropdown menu
   ➔ You can also use the Receivable Lease Number

4. **Select** Equals in the search box criteria

5. **Enter** the UFI

6. **Click** the [SEARCH] button

7. **Click** Open

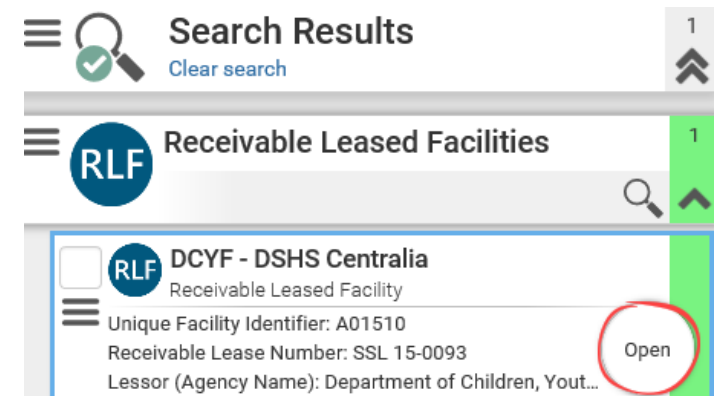**Note:** From the Receivable Leased Facility tile list, you can easily access:
- Facilities
- Receivable Lease Contracts

Navigate to a Receivable Lease Contract

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Receivable Lease Contracts** from the dropdown menu

3. **Click** Refine by ▾ and choose **Receivable Lease Number** from the dropdown menu

4. **Select** Equals in the search box criteria

5. **Enter** the Receivable Lease Number

6. **Click** the [SEARCH] button

7. **Click** Open

Note: From the Receivable Lease Contract tile list, you can easily access:
- Lease Contracts
- Receivable Lease Payments
- Receivable Leased Facilities
- Spaces
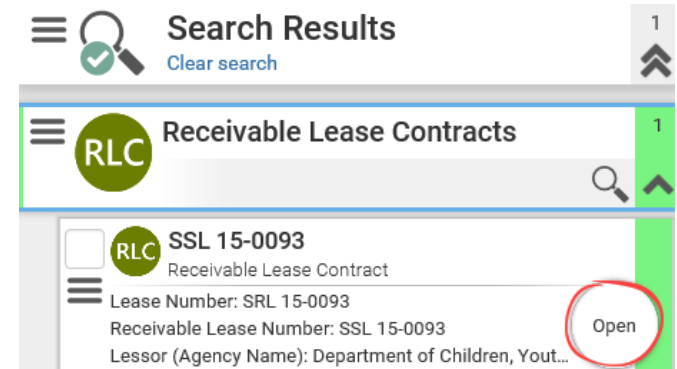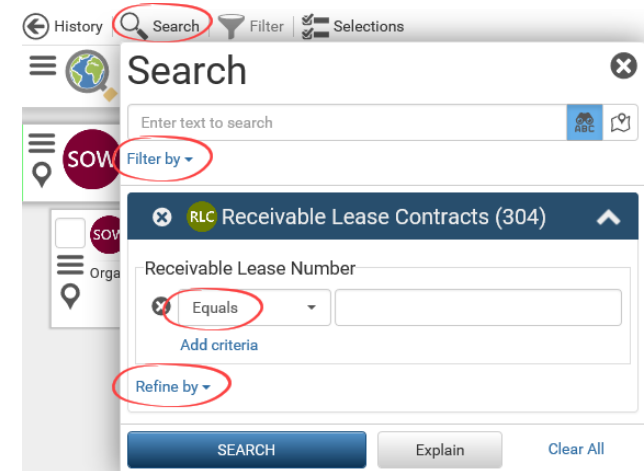
Navigate to an Owned Facility

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Owned Facilities** from the dropdown menu

3. **Click** Refine by ▾ and choose **Unique Facility Identifier** from the dropdown menu

4. **Select** Equals in the search box criteria

5. **Enter** the UFI

6. **Click** the [SEARCH] button

7. **Click** Open
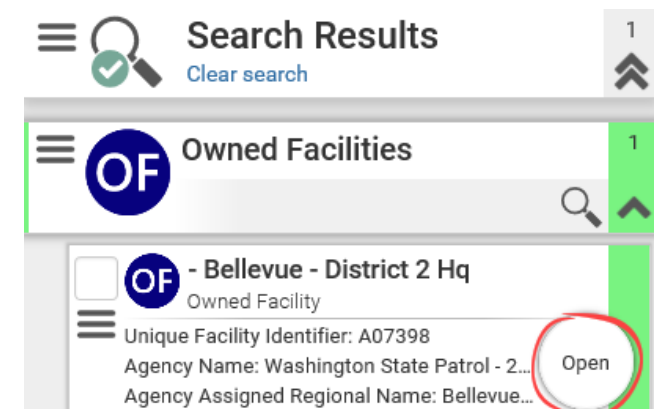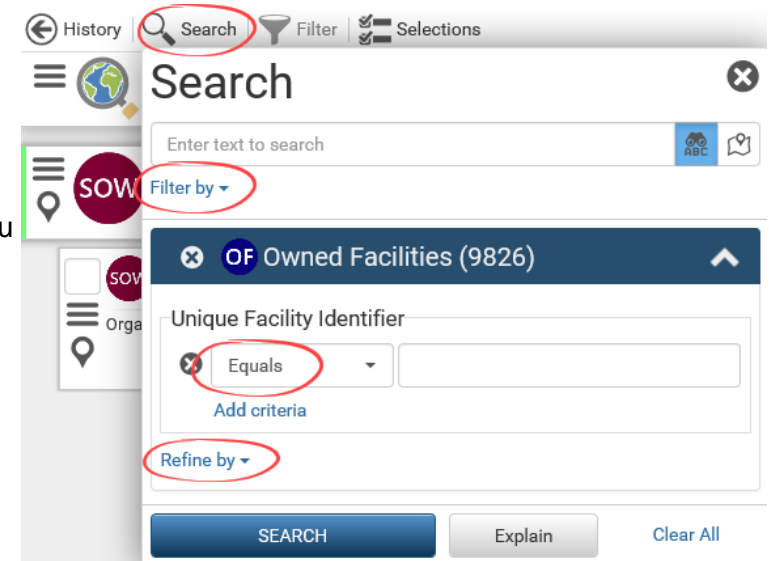
Navigate to a Space

1. **Click** the 🔍 Search button on the data explorer toolbar

2. **Click** Filter by ▾ and choose **Spaces** from the dropdown menu

3. **Click** Refine by ▾ and choose **Unique Facility ID (UFI)** from the dropdown menu

4. **Select** Equals in the search box criteria

5. **Enter** the UFI

6. **Click** the [SEARCH] button

7. **Click** Open
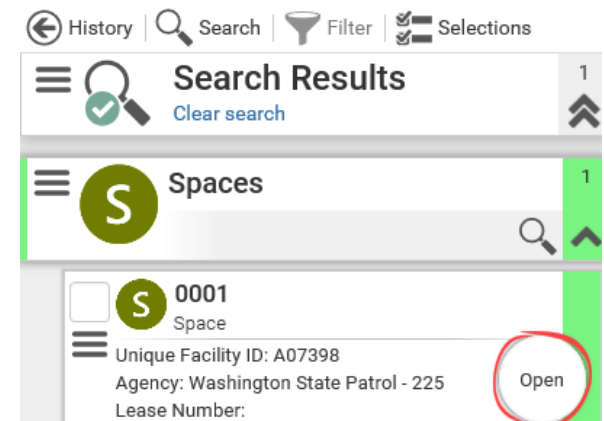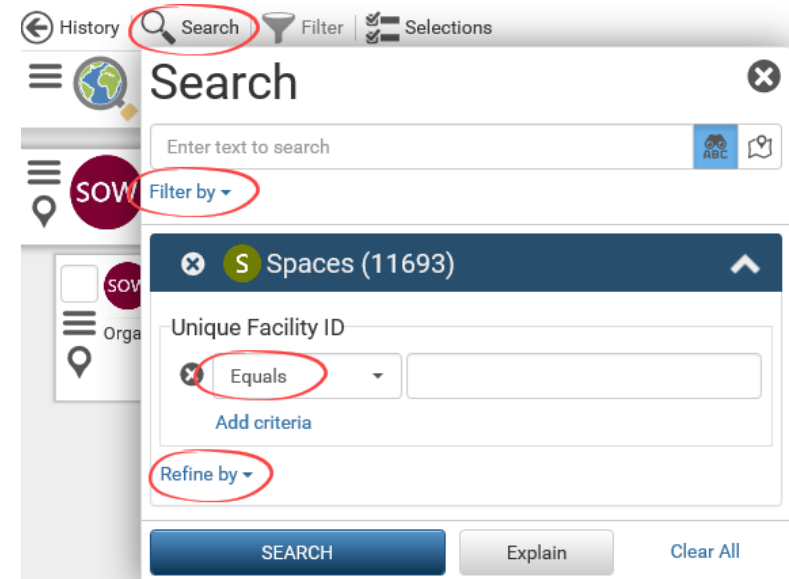
Wizards

New user interfaces, also known as wizards, are now available for most business processes in FPMT. Wizards reduce manual activity by guiding users through each step of the process and automating steps like linking tables and changing table statuses. This simplifies the overall experience and supports reduction of data errors.

Refer to the table below for an overview of the available wizards. The wizards should be used for each of these scenarios. They replace the old business processes. Detailed instructions for each wizard are available on OFM's FPMT webpage.
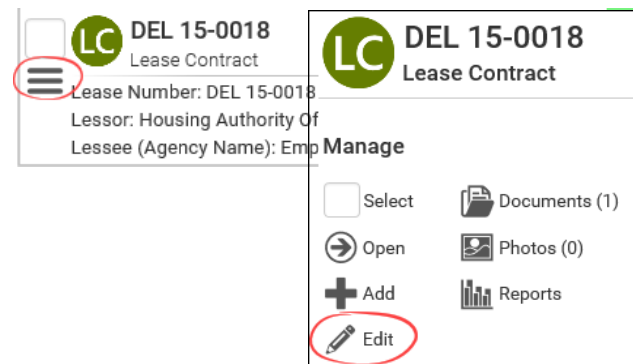
Lease Renewal	Master Lease Renewal	Receivable Lease Renewal	Create a New Owned Facility	Create a New Leased Facility	Create a New Receivable Lease	Deactivation Wizard
Renew	Renew	Renew	Create Owned Facility	Create Leased Facility	Create Receivable Lease	Deactivate
Renew on or after new lease start date Launch wizard from the expired lease contract	Must renew receivable leases at same time or they will be automatically deactivated Launch wizard from expired lease contract	Used to renew a receivable lease on owned facilities or when the receivable lease expires before the master lease Launch wizard from expired receivable lease contract	Will create a new facility as part of this process (geocoding is required) Launch wizard from the agency tile	Have the option of creating a new facility or linking to an existing one Should search for an existing facility first Launch wizard from the agency tile	Need to edit the existing space before adding a new receivable lease space (done inside wizard) Launch wizard from lease contract or owned facility	Launch wizard from owned, leased or receivable leased facility Wizard will deactivate all associated tables Agencies cannot deactivate a facility that has other agency tenants

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Data Explorer – Editing Existing Records

This process is the same for any table in FPMT.

✓   Please note that, in most cases, agencies should not overwrite existing data.

✓   Most business processes now have wizards, so there are less scenarios that require editing a table. An example would be updating workstation and occupancy data for the Six-Year Facilities Plan.

1. Click on the tile ☰ menu button
2. Click ✏ Edit
3. Make your changes
4. Click SAVE AND CLOSE
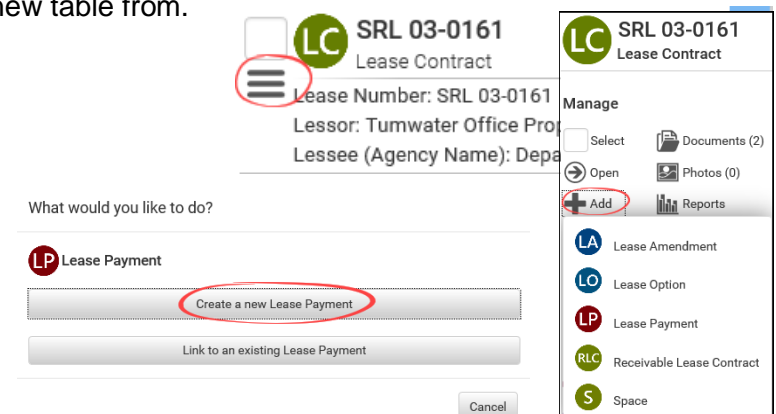
Data Explorer – Adding New Tables

FPMT stores data in tables that are organized by a structured hierarchy. This means tables are related to one another, and new tables are added from an existing record. Most business processes now have wizards to guide you through table requirements. A few processes still occur outside of a wizard.

✓   Refer to the table on the following page for an overview of which tile to add each new table from.

To add a new table:

1. Click on the tile ☰ menu button
2. Click ➕ Add
3. Select which table you want to add from the dropdown menu
4. Select the option for creating a new table (this example is a lease payment)
5. Enter data
6. Click SAVE AND CLOSE

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FPMT Table	Which Tile to Add From
Debt Service	Add from the Owned Facility tile
Debt Service Payment	Add from the Debt Service tile
Operating Costs	Add from the Owned Facility or Leased Facility tile
Condition Matrix	Add from the Owned Facility or Leased Facility tile
Space	Add from the Owned Facility, Lease Contract or Receivable Lease Contract tile
Lease Amendment	Add from the Lease Contract tile
Receivable Lease Amendment	Add from the Receivable Lease Contract tile

Data Explorer – Add Documents and Photos to a Table

FPMT allows you to attach documents, such as a lease contract, and photos to a record in the system.

Documents

1. Click the tile ☰ menu button
2. Click Documents (a new window will open in your browser)
3. Click Upload
4. Browse for your file(s) or drag and drop
5. Click Close
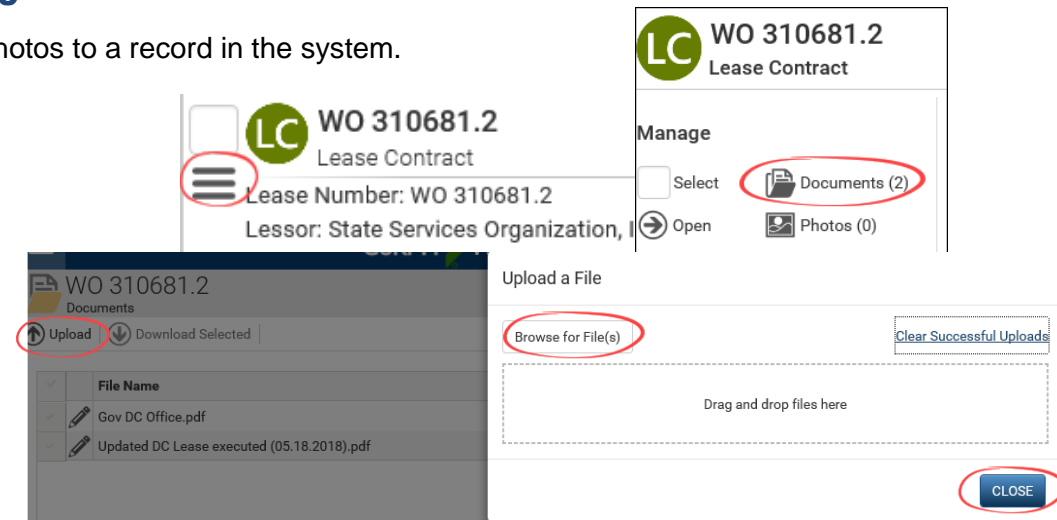
Photos

1. Click the tile ☰ menu button
2. Click Photos (a new window will open in your browser)
3. Click Upload
4. Browse for your photo(s) or drag and drop
5. Click Close

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Data Explorer – Deleting Records

Your user role will determine whether you have permissions to delete records in the system.

✓ Most users do not have permissions to permanently delete records. Instead, they are able to unlink records. **There are currently no business processes that require unlinking records.** When you unlink records, you create an "orphan" record that shows up at the Starting Point with the State of Washington tile.

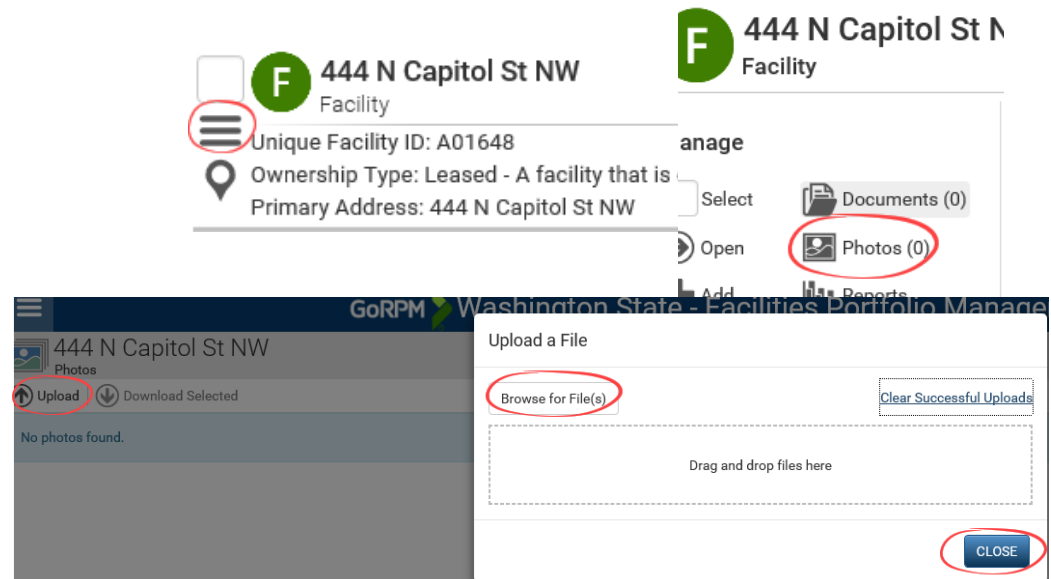✓ If a leased, owned or receivable leased facility is being vacated, use the deactivation wizard. If you are renewing a lease, use the lease renewal, master lease renewal or receivable lease renewal wizards.

✓ If you are trying to delete a record created in error, please contact the OFM Help Desk.

1. Click on the tile ☰ menu button

2. Click 🗑 Delete

3. Select either Remove link(s) or Delete Permanently

4. Click [OK]

NOTE: Choosing Delete Permanently will delete the table and corresponding data immediately. There is no confirmation message and no undo option.
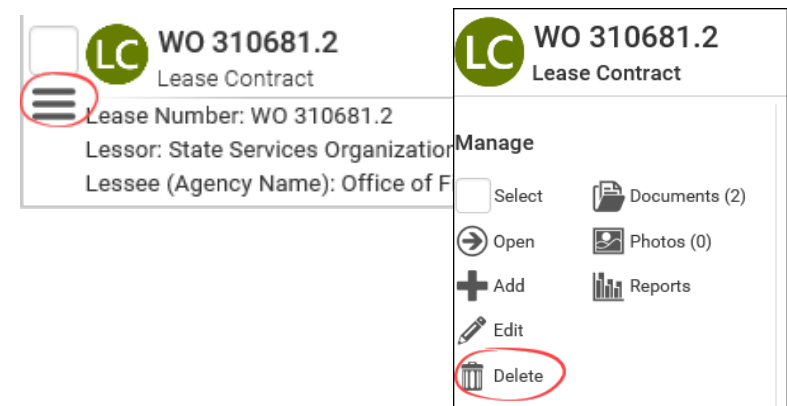
Reports

A variety of reports are available in FPMT. The majority of reports are accessed from the agency tile.
  ✓ Refer to the table on the following page for a description of each report.

1. Click on the agency tile ☰ menu button
2. Click 📊 Reports
3. Select your report
4. Download the report in Excel

Note: The Baseline Report has one additional step. You must enter the desired fiscal year to run
the report.

Note: The Facility Inventory System field on the Facility table must be marked "Yes" for facilities to show up in the below reports.

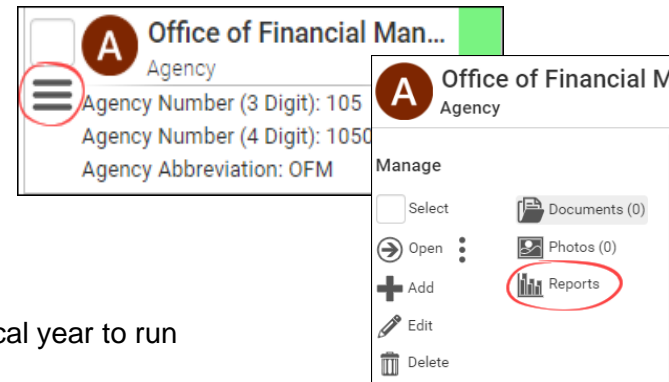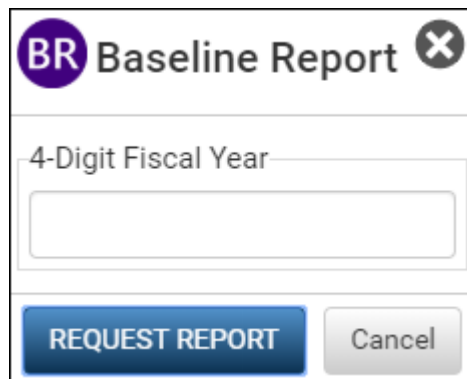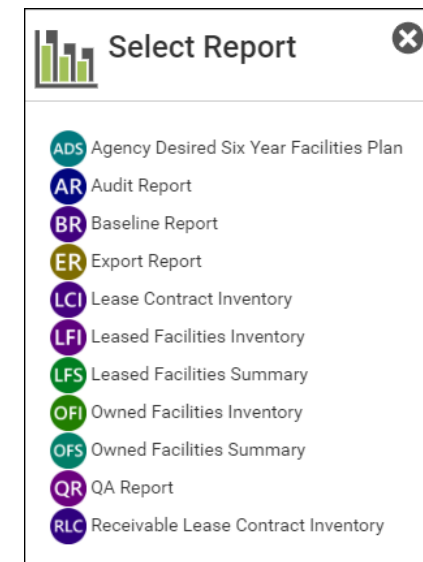| Report	Description
Agency Desired Six-Year Facilities Plan	Required as part of the Six-Year Facilities Plan process. Details an agency's anticipated space requirements and any desired projects (e.g., acquiring new space, downsizing, major reconfiguration etc.) during the timeframe covered by the Plan. Tip: Run this report to see a list of in-scope facilities for the Six-Year Facilities Plan.
Audit Report	Shows all changes made to a record and the user who made them. This report can be run on any tile.
Baseline Report	Required as part of the Six-Year Facilities Plan process. Provides an overview of cost and occupancy data for an agency's in-scope facilities.
Export Report	Allows a user to export a copy of selected records. This report can be run on any tile.
Lease Contract Inventory	Provides a summary of all active lease contracts (associated facility records must be active as well) Tip: Run this report to find a list of lease contract numbers.
Leased Facilities Inventory	Provides a summary of active leased facility information (associated facility records must be active as well) Tip: Run this report to find a list of UFIs.
Leased Facilities Summary	Required report for the annual Facilities Inventory. Provides high-level metrics for an agency's active leased facilities (associated facility records must be active as well).
Owned Facilities Inventory	Provides a summary of active owned facility information (associated facility records must be active as well). Tip: Run this report to find a list of UFIs.
Owned Facilities Summary	Required report for the Facilities Inventory. Provides high-level metrics for an agency's active owned facilities (associated facility records must be active as well).
QA Report	Summarizes common errors in the data. Agencies are required to run and review the QA report prior to submitting their Owned/Leased Summary reports or Baseline Report to OFM. Refer to the QA job aid for information on how to correct errors.
Receivable Lease Contract Inventory	Provides a summary of all active receivable lease contracts (associated facility records must be active as well). Tip: Run this report to find a list of receivable lease contract numbers.